ECO-TOURISM IMPACT / SUCCESS INDICATORS
BASELINE DATA 2002

KALOFER PILOT REGION
OF CENTRAL BALKAN NATIONAL PARK

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Bulgaria Biodiversity Conservation and Economic Growth Project

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Preface

The Biodiversity Conservation and Economic Growth (BCEG) Project is funded by the United States Agency for International Development, (USAID), as part of its strategic support to the Republic of Bulgaria. The Project is sponsored by USAID in conjunction with the Government of Bulgaria – the Ministry of Environment and Waters (MOEW). The Project is governed by a Memorandum of Understanding (MOU) between the two governments, and its implementation covers the period: May 2000 – June 2003.

This Project is a logical evolution of earlier USAID assistance to biodiversity conservation in the country. It follows some 10 years of assessment, technical assistance and financing of Bulgaria's biodiversity conservation strategic development, new protected areas legislation, and new national park institutions. The Project is designed to capitalize on the achievements of the Bulgaria Global Environmental Facility (GEF) Biodiversity Project (implemented during the period June 1995-April 2000), and builds on lessons learned.

The BCEG Project addresses six specific contract themes known as tasks or "contract result packages". The BCEG Project includes the finalization and implementation of two national park management plans, the development of a new management plan for Rila Monastery Nature Park. It assists in the development of financial mechanisms and strategies to ensure the solvency of national parks. The Project pilots economic growth activities with select target groups around two Bulgarian national parks. And it continues to build on the principles of strong public information and awareness as stepping stones for informed public engagement and promotion of biodiversity conservation and protected area management activities.

This Project is issued as a Task Order (Contract Number LAG-I-00-99-00013-00) under the USAID Global Biodiversity and Forestry Indefinite Quantities Contract (IQC); and is implemented on behalf of USAID by Associates in Rural Development, (ARD) Inc., of Burlington, Vermont, USA.

The Project is implemented through a Project Management Unit (PMU) based in Sofia, and includes a Team Leader, three Bulgarian technical specialists, and support staff. Project activities are coordinated through two mechanisms –
    a)   Project Coordination Group – serves as a steering committee for Project planning and monitors implementation. This consists of the National Nature Protection Service of the MOEW, and national park directors, the PMU and USAID;
    b)   Project Counterpart Team – PMU staff working with MOEW/NNPS counterparts.

The Project is largely implemented through the Directorates for Rila and Central Balkan National Parks. Additional technical assistance is provided by Bulgarian and international consultants, and is based on specific terms of reference.

Executive Summary

An Eco-tourism Monitoring Guidebook was developed as part of program of support to rural eco-tourism development in association with two of the country's largest national parks – Rila and Central Balkan. Two pilot areas have developed models of community eco-tourism as a result of projects undertaken by these two national parks in the implementation of their management plans. The community eco-tourism models developed with the assistance of national parks have demonstrated successful examples of *public-private enterprise* and coalitions with protected areas, as well as a viable tool for community development. The Guidebook was used by community ecotourism initiative groups to collect the baseline data for monitoring eco-tourism impacts in the two pilot areas. The results of their work can be found in this report for Kalofer pilot area, associated with Central Balkan National Park and in another report for Samokov pilot area, associated with Rila National Park.

The Guidebook is dedicated to the belief that communities who set their own targets for eco-tourism development are also in the best position to chose and monitor their success or failure. Self- selected community indicators in which all community eco-tourism developers are engaged in identifying and monitoring works much better than those imposed from outside the community.

A research project on the status of eco-tourism in the Kalofer pilot region was conducted in the summer of 2002.

Objectives:
Application of the ***Guide for Monitoring of Eco-tourism Impacts*** in protected areas in Bulgaria and neighboring communities, developed by the Biodiversity Conservation and Economic Growth Project and implemented by ARD, Inc, with funding from the U.S. Agency for International Development

Collection of information on the current status of eco-tourism on a comparative basis to assess future changes.

Implementation period: June 2002
Region: Kalofer pilot region
Subjects of research (general totalities):
- Tourist entrepreneurs' establishments
- Visitors
- Local population
- Local authorities

Methods:
Standardized questionnaires designed for:
      I   Managers of tourist establishments
      II   Visitors
      III Local communities
      IV Local authorities

Inventory tables completed by the local administration.

Approach: direct, one-time research

<u>*Volume of research sample:*</u>
  58 individuals representatives of local communities
  50 visitors
  27 tourist establishments

<u>*Representation:*</u>
  1) The results are not representative of all the local population and visitors
  2) Results are representative for the general whole of tourist entrepreneurs'
      establishments since in small communities they comprise the larger part of the
      business community.

Results from research in Kalofer pilot region

The research results are presented by the indicator groups as they are introduced in the
Guide for Monitoring of Eco-tourism Impacts.

1. Tourism sector

There are emerging and developing family eco-tourist businesses and a positive trend for
expansion. This will result in the creation of new jobs for people outside these families. The
main features of the eco-tourist sector are:
  1. year-round local employment
  2. existence of eco-tourism NGOs
  3. availability of local educational programs in tourism.
  4) a 50% growth in municipal expenditures in 2001 for improvement in the overall
      infrastructure, as well as over a 60% growth in the construction of recreation and
      tourism facilities, as compared to 1999

All are indicative of favorable conditions for eco-tourism development

Areas that require attention are
  1) improvements in the categories of accommodation facilities and the diversity of
      services offered
  2) tourism infrastructure
  3) formal and informal allocation of responsibilities among the state, the private
      sector and the public sector.

2. Visitors

Collecting information from and on visitors annually is an important component of the eco-
tourism monitoring system. This information can serve as a basis for assessing the quality of
supply and adaptations in supply, for tourist product development, and for strategically
planning tourism development in the destination of concern. Most visitors to Kalofer are
Bulgarians living in Sofia (39.4%), Plovdiv (21%), and other large cities of the country
(11%). All individuals questioned are up to 45 years of age, and most have a secondary or
higher education. Based on their responses to the questionnaires, they are people with an
average income for Bulgaria.

The needs and preferences of visitors to Kalofer overlap fully with the profile of potential
eco-tourists in Bulgaria. Visitors prefer short trips and about one third have visited this

destination many times. They learned about Kalofer mostly from relatives or friends. Visitors' perception of this destination is related to the specific features of eco-tourist product offered – serenity in natural surroundings and preserved cultural and historical heritage.

3. Tourist destination

Each entrepreneur recorded a slight increase in the number of visitors, which is a characteristic trend for newly developing destinations. Currently there are nine registered accommodation establishments and half of them have been operating for more than four years. The accommodation capacity of Kalofer is 105 beds. At this time there is no threat of exceeding the carrying capacity of the destination. Tourist costs are primarily for accommodation and dining. The costs for eco-tourist services constitute a small share of the overall costs, and are indicative of the potential for developing eco-tourist attractions.

4. Economic effects of tourism.

Indicators of the economic effects of tourism give an idea of the role tourism plays in the overall economy. These indicators are divided into seven groups and require annual monitoring by both local authorities and eco-tourism entrepreneurs.
The main effects noted in the analysis of these indicators are:
1) eco-tourism is the main source of income for one-half of those employed in eco-tourism
2) the number of people with professional qualifications is insignificant
3) almost all establishments are owned by local entrepreneurs
4) none have used bank financing
5) less than one third of the local entrepreneurs are members of some tourism organization
6) the increase in enterprises is well paced with tourism development
7) less than one percent of those employed work in the eco-tourism sector, indicating that eco-tourism has little actual effect on job creation
8) goods and services for eco-tourism businesses are purchased locally, which helps to encourage additional small business development"

5. Social effects of tourism

Indicators used for monitoring social effects show the direct and indirect positive impacts of tourism on social life in the community. They need to be monitored annually by local authorities.
The following positive effects, however of narrow scope, have been measured in the Kalofer region:
1) a 49% growth in enterprises for commercial and social infrastructure in 2001, compared to 1999. There are no statistics for enterprises related to recreation and sport.
2) a strong positive attitude in local communities towards eco-tourism development and an absence of irritability among local people
3) a positive trend in local community development, with an insignificant negative population growth and the construction of new lodgings

    4)   low level of noise pollution.

Needed improvements include a reduction in solid waste and a reduction in the intensity of traffic during the active season.

6. Cultural effects of tourism

The cultural effects of tourism are indicative of the overall effect tourism has on the culture and cultural heritage of the region. These indicators require annual monitoring on the part of local authorities. Eco-tourist entrepreneurs should monitor the indicator for use of local knowledge and skills in tourism and in tourist supply seasonally. The research found that:

1) There do not appear to be any threats to local culture as a result of impacts from tourism. Most of the local community share the opinion that eco-tourism tends to preserve local culture
2) A broad range of local crafts is part of the eco-tourism supply
3) The nine annual cultural events are not sufficient to develop local cultural tourism
4) There is an average degree of compliance of tourist infrastructure with local architecture

There are no statistics on significant indicators to identify probable impacts from all tourism activities in the region, not just eco-tourism. The main recommendations from the respondents focus on simplifying the questionnaires and on the frequency of monitoring different indicators.

1.0   Success and Impact Indicators of Eco-tourism Development
Methodological Introduction

1.1 Purpose of indicators

The set of impact and success indicators of eco-tourism is an instrument that assists in better understanding the impact of eco-tourism on the environment. By monitoring these indicators, one can evaluate whether the overall objectives for eco-tourism are being met. To define whether a given region is sustainable in terms of tourism development impacts, a number of indicators are needed showing the relationship between tourism activities and the capacity of the area to sustain these impacts.

Indicators help resource managers and others identify how communities change as a result of tourism development. Eco-tourism is associated with the most valuable natural and cultural sites and phenomena in a given destination. Damage to these resources will undoubtedly be followed by economic losses for those whose livelihoods depend on tourism, and by ecological and social losses for the whole local community. Thus, it is critically important for eco-tourism to be developed in harmony with the environment, and businesses should play a leading role in establishing sustainable ecological and economic practices.

The following categories of effects indicate the possible risks of environmentally unfriendly development and development of tourism as a whole, including eco-tourism development:
   ▪ Too much infrastructure
   ▪ Water, air, and soil pollution
   ▪ Noise pollution
   ▪ Deteriorating quality of natural resources from too many people
   ▪ Changes in the culture of host community

The long-term viability of tourism can be assured only when the limitations and favorable opportunities of the overall environment for tourism development are understood and ways to measure changes induced by tourism are identified and applied. Though eco-tourism is not usually associated with a large number of visitors, its development in a given community over a long period of time can lead to a number of changes that may negatively affect the community's social, cultural and economic life and its natural environment. These changes might not be conspicuous, especially if the number of visitors is small or if eco-tourism activities are not causing any substantial impacts. However, these types of changes tend to accumulate slowly and gradually over course of weeks, months or years, and can ultimately bring about huge and irreversible changes in the environment, deteriorating the living conditions of the local community. This is why it is essential that these changes be regularly observed and monitored to project future changes, follow trends of development, and establish controls and possibilities for regulation of undesirable processes.

Even when eco-tourism leads to positive changes it is important to monitor changes in the community in order to identify the level to which the desired eco-tourism objectives are being achieved. Indicators can show steady tendencies in eco-tourism development. This is why measuring changes and providing this information to local people, and to relevant authorities and institutions responsible for community development, and management of eco-tourism could help them to make the best decisions. Using indicators makes it possible to collect and develop a considerable amount of data on tourism in the community, including

opportunities for periodic updating and creating a dynamic order, as well as measuring and assessing change.

1.2. Structure of indicators

The methodological approach of this study is based on a set of tourism impact indicators that can be used in the process of eco-tourism planning and can provide necessary information for managers in tourism and administration officers in the public sector. These impacts are grouped in three categories:
1) socio-cultural - effects on the social and cultural life of community
2) economic - effects on the economic life of the community
3) ecological or physical - effects on the natural resources or their ecological state, within the community or in the surrounding area

Structuring the indicators, or identifying the main groups, is based on their role in supporting the types of decisions local authorities and the tourist industry must make in the process of planning and managing tourism. Thus, one and the same question may fall within the details of several indicators. The main types of indicators in practice in the world today are:

Precautionary indicators – these indicators help to identify and prevent problems. Examples of the most widely used indicators in this category are: a decrease in number of regular visitors, decreased number of visits, and a decrease in the number of investments.

Indicators measuring carrying capacity or stress factor – these measure external factors or tendencies that should be considered in the process of planning and management. The best examples are: an increase in population, varying demand, increased loading from a variety of uses on one and the same resource.

Indicators measuring the state of natural resources and volume of demand for these resources – these indicators help managers identify what has changed in these resources in relation to other similar resources, when compared with previous data or to accepted standards.

Indicators measuring impact/effects of tourism - these indicators can be integrated into business plans, or be used to target activities that may be producing an effect that needs to be addressed. An example is closing beaches due to pollution problems.

Indicators measuring management efforts/actions - these indicators provide information that is used to measure the results of actions taken. Some examples include levels of controlled pollution, costs made for control of solid wastes, and size of protected areas.

Indicators measuring the consequences of management efforts - These identify the effect of measures taken for sustainable development of tourism in the community. An example is lowered levels of degradation in natural complexes.

The main group of indicators is used to measure and provide the necessary information to the basic sectors involved in eco-tourism activities:

Public sector – the indicators show the actual role of each participant and reveal the relationships among them.

Visitors - monitoring is targeted at management of product quality by using indicators to determine the visitor's degree of satisfaction with the goods and services offered.

Tourism sector - indicators provide information on tourism quality and its dynamics, and help to identify the key trends in its development.

Local population –- indicators indirectly measure changes in the economic, socio-cultural and ecological environment through the attitudes and perceptions of the local population. They show whether there is economic growth, whether the psychological comfort of local population is established or violated, and whether qualities/features of the natural environment and of cultural and historical heritage are preserved and improved.

1.3. Methodology of research

Data collection was carried out in June through direct, one-time inquiry by a team of master students in Tourism of Sofia University St. Climent Ohridsky. The team interviewed 58 representatives of local communities, 50 visitors, and 27 tourist establishments. The student magistrates were specially trained to conduct interviews and had some former experience in this field. As part of the interview process they shared their experience with schoolchildren from the in tourism in the secondary schools in the towns Kazanluk and Kalofer. Data collected from the completed questionnaires were processed using the statistical package SPSS, in percents and ratios. The percentage of respondents in this study was quite high - 90%.

To obtain the opinion of the local population the so-called " street inquiry" was used. Interviews were done in public places such as the town square, streets and public buildings. This type of inquiry was appropriate to the objectives, i.e. quick, one-time research to obtain relatively reliable information based on spontaneous answers and in a way that allowed the interviewer to oversee filling in the forms. The visitors' questionnaires were completed where the visitors were staying, and over 90% responded. The tourist sector questionnaire*s* were completed at dining and accommodation establishments, identified by the Eco-tourism Initiative Group. The questionnaires were completed either with the help of the interviewers or independently by the managers or owners of these establishments.

Information the public sector (local authorities) was collected from different local government bodies using inventory tables. This was a three-stage procedure: 1 preliminary meetings with representatives of local authorities to clarify the volume and essence of information; 2 submitting the questionnaire to the municipalities to be filled in by "a person in charge", and 3 interviewers picking up the completed questionnaires.

The main groups of indicators were studied with the help of about 200 questions. This large number questions is difficult to use in monitoring because they require considerable effort and time and there is no statistical data available for many of them. The large number of indicators was used during the first phase of the research with a view that collecting as much information as possible would help to specify some factors in detail when appropriate

2.0   Results from the research conducted in the Kalofer pilot region

The results of the research are presented by the indicator groups identified in the ***Guide for Monitoring of Eco-tourism Impacts***. For purposes of the present analysis, the main group of indicators is described with the help of a minimum set of key questions

2.1 Tourism sector

The indicators and related indices (questions) are most often quantitative and give an idea of the scope of the tourism sector. For example there are questions about the overall number of tourism enterprises and the number of people employed in tourism. On the other hand, these data allow a comparison between tourism and other economic activities. This helps to define tourism's role in regional development at the present time, to evaluate the objectives that were set, and to identify future objectives related to tourism development in the region. These indicators and indices highlight the overall picture of tourism, i.e. what aspects are well developed, to help make relevant management decisions at the local level.

Eight groups of indicators have been included in this research (Table 1):
1) Number of those employed in tourism
2) Type of employment
3) Salaries/wages
4) NGO-s involved in tourism
5) Contributions by government (construction, donations)
6) Improvements that are needed – facilities and services
7) Availability of local training in tourism
8) Allocation of responsibilities among the private sector, the state and the public sector, including NGO-s

Some indicators, for example 2,6,7 and 8, refer to important qualitative aspects of tourism in the region. They are interrelated and serve as a basis for a more profound economic analysis. For example indicator 2 (the ratio of permanent to temporary employment) may be used for identifying training needs. Practice has shown that the use of a large share of the temporarily employed labor force requires maintaining needed professional skills through consistent training.

It should be noted that some of the questions may be used to reveal various aspects of tourist development and hence are included in other, different groups of indicators

2.1.1. Number of people employed in tourism – this is the main qualitative indicator. It shows the scale of the business. It needs to be permanently monitored.

Key questions:
- *How many people work at the establishment?*
- *Number and/or percent of people employed in tourism from the local population.*

At present, there is no available information on the dynamics of existing jobs, but there is a positive trend in employing local people.

2.1.2. Type of employment - this indicator should be used in combination with the former one to reveal the qualitative state of local employment.

Key questions:
- *What is the ratio of year-round to seasonal employment?*
- *What is the ratio of permanent to temporary employment?*
- *What is the ratio of local to external labor force?*
- *What is the ratio of men to women?*
- *What is the ratio of full time jobs to part time jobs?*
- *What is the profile of the employees – members of family or hired labor?*

There is a trend in family businesses to expand by creating new working places or hiring local people outside the family. The ratios between full and partial employment and between permanent and temporary employment are favorable for development of businesses. Those occupied full time and all-year through tend to prevail.

2.1.3. Salaries / wages – this indicator and related question give an idea of the financial state of the business and serves as a base for comparison with the average values for the country.

Key question:
- *How many workers receive the minimal salary, the average one and above average for the country?*
- *What is the average salary in the community?*

At present, remuneration is within the within the average salary for the country.

2.1.4. NGOs involved in tourism – this group of indicators shows awareness of the important role of the non-governmental sector in the planning process for tourist development at local level. The establishment of NGOs dealing with tourism issues is a step towards developing mechanisms for their formal participation in strategically planning economic development, including the development of tourism.

There are two active organizations in the region – the Eco-tourism Association Central Balkan-Kalofer and the Craftsmen Society. However their membership is rather poor, with only three tourist enterprises listed as members. There is also one membership in the Bulgarian Association for Alternative Tourism (BAAT).

2.1.5. Contribution on the part of government - this group of indicators is very important because recreation and tourism require a certain level of development in both overall technical infrastructure, such as water and sewage, electric power supply and roads, as well as in public facilities for diverse recreation activities. Usually external visitors, tourists included, use sport, entertainment and other facilities constructed initially for the needs of local people. Local and central government have the primary responsibility for providing these infrastructure facilities. They are also responsible for identifying various sources of financing, and assisting local government in obtaining financing for building such facilities.

Key issues:
- *Contribution on the part of central government for developing tourist enterprises, such as number of constructions and amount of donations*
- *Expenditures of the municipality for maintenance of technical infrastructure*
- *Expenditures of the municipality directly related to tourism, i.e. tourist facilities, attractions, cultural centers, and sport facilities.*

In 2001 the municipality had a 50% increase in expenditures for improving the overall infrastructure and a 60% increase for construction of recreation and tourism facilities, as compared to 1999. There has been no contribution to tourism by the central government.

2.1.6. Improvements that are needed in facilities and services – this indicator is indicative of the availability of facilities to satisfy two groups of needs: the usual daily biological needs as sleep, food and personal hygiene, and for communication, safety and security, and second the needs associated with recreation and amusements at the establishment and in the region.

Key questions are:
- *Is the establishment categorized according to current regulations?*
- *What is the capacity of the establishment?*
- *What fire alarm equipment has been installed?*
- *Is there parking at the establishment?*
- *What are the dining facilities – taverna, restaurant, coffeehouse, confectionery, bar, disco club, others?*
- *Is there a separate WC in the rooms?*
- *Are there phone, TV and radio sets and air conditioning in the rooms?*
- *What additional services are offered at the establishment?*

Most accommodation facilities are in the low category, and provide no extra services. Some offer TVs and telephones.

2.1.7. Availability of local training in tourism – establishing and maintaining an educational/ training network in the field of tourism is necessary for providing services that meet the requirements of tourists. A training network also means additional local employment.

Key questions for this group of indicators are:
- *How many of those employed have the necessary education and qualification in tourism?*
- *How many of those employed have worked in tourism before?*
- *What are the training/educational needs at your establishment?*
- *What qualification/training course would you like to cover?*
- *What are the training/educational needs in the area of tourism of the community?*
- *Number of local training programs or schools in the area of tourism*

There is just one class in the secondary school in Kalofer where tourism education is available. There are no opportunities for professional specialization and training of personnel employed in tourism. There are several areas where specialized training is needed, including accommodation and catering, marketing, management, and specialized tourist services.

2.1.8. Allocation of responsibilities among the private sector, the state and the public sector, including NGOs – in times of strong competition and especially in this period of transition to a market economy, it is essential to integrate the efforts of all the sectors related directly or indirectly to tourism. Often the interests of various sectors differ and sometimes tend to contradict. That is why it is necessary to clearly identify common interests, which in turn would require efforts to unite to establish favorable business conditions.

Key questions are:
- *Number of enterprises related to tourism*
- *Number of NGOs working with tourism*
- *Number and type of certificates issued*
- *Allocation of responsibilities related to tourism development*

The Eco-tourism Association Central Balkan-Kalofer is a forum for communication among tourism stakeholders, including the management of the national park. At the present time the role of the municipality is solely issuing certificates for tourist operations. There has been no formal or informal allocation of responsibilities among the three main stakeholders.

Table 1 Tourism sector in Kalofer

Indicators	Questions from the questionnaires	Index Value	Index-Growth in % -Base for comparison		Recommended indicator value
Tourism sector		**Number**	**%**		
1. Number of employees in tourism	*I- Number of people employed in tourist establishments?*	10		Base	**Increase**
	IV- Number of local population employed in tourism			Base	**Increase**
2. Type of employment (full time, part time, seasonal, local/external)	*I- What share of those employed are:*		0.8		**Improvement** – value above 1
	Local people or from other community	10/ 0		Index-2.3 Index-1	
	Permanently or temporarily employed	7 /3			
	Full time or part-time	7 /3			
	Men/women	5 /5	…		
3. Salaries/Wages	*I – How many workers get the following salary?*	10			
	Minimal			Base	**Increase - Above the average salary Increase**
	Average for the country				
	Above the average for the country				
	IV- What is the average salary in the community	100 BGL		**Base**	Increase
4. NGO-s involved in tourism	*IV- Number of NGO-s involved in tourism*	2		Base	**Improvement** – according to local strategy
5. Contribution of central government (construction, donations, others)	*IV- Number of constructions, donations, etc.*	…		…	**Statistics needed**

6. Improvement needed	*I - What is the category of the establishment?*				
	I – Is the establishment categorized according to Regulation 2002?				
	I – What is the capacity of the establishments (beds) ➢ Single and double rooms ➢ Rooms with three or more beds	95 45 55		Base	**Improvement-** According to local strategy
	I- What is the heating source used? ➢ Wood ➢ Diesel ➢ Electricity ➢ Coal	70 0 30 0		Base	**Improvement-** According to local strategy
	I-Establishments with fire-precaution facilities. ➢ 1 fire-extinguisher ➢ 2 fire-extinguishers ➢ over 3 fire-extinguishers			Base	**Improvement-** According to standards set
	I- Is there a parking place to the establishment. ➢ With parking place ➢ No parking places	1 2		Base	**Sustain**
	I-Establishments offering dining and drinks. ➢ No dining ➢ Dining and drinks	1 9		Base	**Sustain**
	I- Is there a separate WC to the room? ➢ Yes ➢ No	10		Index – 0.1	**Improvement – value close to 1**

I- Is there in the room: ➢ Telephone ➢ TV ➢ Radio ➢ Air-conditioning	10 6 1 0		Base	**Improvement – According to business plans**
I. Extra services offered by the establishment related to local folklore, culture and traditions ➢ Establishments that offer extra services ➢ Establishments that do not offer such services	 0 10		Base	**Improvement – as per business plans and local strategy**
I. Establishments with personnel that has the necessary education and qualification in tourism ➢ With the necessary education ➢ Without the necessary education	 0 10		Base	**Improvement – sharp change**
I-Establishments with business plan ➢ With business plan ➢ Without business plan	 0 9		Base	**Improvement – sharp change**
I – Distribution of new investments: ➢ Local taxes and charges ➢ New equipment ➢ Rehabilitation works ➢ Resources and materials ➢ Other expenditures	 6 33 20 15 26		Base	**Improvement – as per business plans and local strategy**
I – Attracting customers by means of: ➢ Mediators ➢ Relatives and friends ➢ Others	 10 85 5		Base	**Increase - in market ing channels**

	I – Membership in tourism organizations.			Base	**Increase of members**
	➢ establishments that are not members of any organization	7			
	➢ establishments that are members of organizations	3			
7. Availability of local training in tourism	*I- Establishments with personnel with the necessary specialized education and training*			Base	**Improvement** – sharp improvement
	➢ Without the necessary specialization	10			
	➢ With the necessary specialization	0			
	I – Establishments with personnel experienced in tourism				**Improvement** – sharp improvement
	➢ Little or no experience	10			
	➢ Experienced	0			
	In your opinion, what are the training/educational needs of the personnel in your establishment?			Base	**Improvement – According to business plans**
	➢ Room maids	75			
	➢ Cooks	10			
	➢ Waiters	10			
	➢ Receptionists	10			
	VI – Number of local programs / schools for training in tourism	2			**Improvement – as per local strategy**
8. Distribution of responsibilities among private sector, the state, and NGOs.	*IV- Number of tourism-oriented enterprises*	5		Growth – 150%	**Improvement – as per regional development plan**
	IV- Number of NGOs in the field of tourism	2		Base	**Improvement – as per local strategy**

IV- Number and type of tourism certificates issued by the municipality in 2001. ➢ Accommodation establishments /2002*/ ➢ Dining establishments ➢ Applied crafts	17 2 –16* 12 3	Base	**Improvement – as per local strategy**
VI – Allocation of responsibilities for tourism development	-		**Improvement – As per local strategy**

Key to Indicator Values: Improvement; Decrease; Sustain; Increase; ***Dots –***absence of statistical data

     I   Questionnaire for managers of tourist establishments
     II   Questionnaire for visitors
     III   Questionnaire for local communities
     IV   Questionnaire for local authorities

2.2 Visitors

Monitoring visitors is an important element in the monitoring system. Visitors should be
monitored continuously, and the data should serve as a basis for evaluating the quality of
services, for making changes in services, for developing the tourist product, and for
strategically planning tourism development at the destination.
The main groups of indicators found in Table 2 are:

        1) Income, demographic characteristics and other data on visitors
        2) Needs, recommendations and interests
        3) Satisfaction with services and facilities
        4) Models of visits
        5) Access to services
        6) Parking
        7) Image of the destination

2.2.1. Income, demographic characteristic and other data for visitors - these indicators are
important for understanding a broad range of physiological, educational, spiritual and other
needs of visitors. Good knowledge of these can lead to setting feasible objectives in
developing a tourist product that meets the expectations of visitors and therefore achieves an
acceptable quality.

Key questions in this group of indicators are:
-   *How did you come to know about this tourist place?*
-   *What is your nationality?*
-   *What is your permanent living address?*
-   *What is your sex?*
-   *What is your age?*
-   *What is your marital status?*
-   *What is your education/profession?*
-   *How do you evaluate your standard of living?*
-   *How did you organize your vacation?*

Most of Kalofer's visitors are Bulgarians who live in Sofia (39.4%), Plovdiv (21%) and
other large cities in the country (11%). All individuals questioned are younger than 45 years
of age and 46% have a higher education. Based on their responses to the questionnaire, their
incomes are average for Bulgaria. This research has demonstrated that the types of visitors
to Kalofer are consistent with the profile of potential customers for eco-tourism in Bulgaria.[1]

2.2.2. Needs, preferences and interests – this group of indicators is important because it
directly relates to visitors' motivation for choosing a specific tourist establishment, and is
indicative of visitors' expectations of the quality and quantity of goods and services
important to them. Monitoring these indicators provides measures of compliance with the
quality of tourist product.

The key question is:
What is the purpose of your visit here?

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[1] Prospects for the Development of Eco-tourism in Bulgaria. Research on domestic market Project BCEG,
2002

The needs and preferences of visitors are quite consistent with the characteristics of eco-tourist destination – recreation and activities oriented to natural and cultural heritage.

2.2.3. Satisfaction with services and equipment – this indicator is viewed as a complex one and is a function of many other factors and indicators. The key questions focus on establishing consistency between the visitor's expectations of relevant goods and services and their actual perception of tourist supply at their destination. This indicator requires answers to questions clarifying the character of tourist demand and visitors' behavior revealed in the purpose of their visit, and activities they tend to perform or would like to perform during their stay. There are also some questions that require a direct answer on the degree of satisfaction with the stay and specific services provided.

The key questions related to this indicator are:
-   *Are you satisfied with your vacation here?*
-   *Would you like to visit this place again?*
-   *Would you recommend this place to your relatives or friends?*
-   *What is your overall impression from your stay here?*
-   *What is your assessment of the separate components of tourist supply?*

There is a high degree of satisfaction with the quality of services offered. It will be essential to monitor the dynamics of this indicator, as it is dependent on the market dynamics for specialized eco-tourist products.

2.2.4. Models of visit – this group of indicators reveals the basic model of recreation activity. They show what the recreational activities are. When compared with the questions about the visit and the relevance of recreation and tourism activities, it becomes clear whether the tourist product supply meets tourists' expectations. The indicator also shows what their future intentions are to visit again. To a certain degree, their intention depends on whether the hypothetical recreation supply and the actual supply are similar.

Key questions:
-   *How many times have you visited this place?*
-   *How long are you staying here?*
-   *Where did you get information about this tourist establishment?*
-   *How is your vacation organized?*
-   *What are your approximate costs for your stay here?*
-   *What recreation activities did you do during your stay?*

Short-term visits tend to prevail and about one third of the visitors have been to the Kalofer area repeatedly. Relatives and friends were their main source of information about the area.

2.2.5. Access to services - among the basic components of tourist supply is accessible information and transportation. This indicator is a complex one and can be described using a number of indices/questions related to various elements of the transport system. It is important that they be defined precisely, depending on the type of transport to the tourist destination of concern/

Key questions:
-   *What means of transportation did you use to get here?*
-   *How do you assess the transport accessibility of the tourist establishment?*
-   *How do you assess the informational accessibility of the tourist establishment?*

Access to the Kalofer area is good, but there isn't much signage or other guide information.

2.2.6. Parking – this indicator is related to the previous one but is monitored separately since parking is a service used during a stay at the tourist site. It is an important indicator to monitor at the research establishment since the automobile is the main mode of transportation. When tourism is practiced on a smaller scale, one's personal automobile is the more common form of transportation.

Key questions:
- *Does the establishment have any parking spaces?*
- *Please assess options for parking at the accommodation establishments*

Parking conditions in Kalofer are very good.

2.2.7. Destination image –this group of indicators demonstrates what the tourists' perceptions are of the destination. Practice has shown the importance of this factor when tourists make decisions about where to visit. Tourists' opinion do not always coincide with that one of producers of goods and services, hence it is essential to know what the image of the tourist establishment is in the eyes of tourists. It is important to use this information to plan proper marketing efforts, and to maintain and make further improvements to establishments. The image of a destination is closely connected with the degree of satisfaction tourists have about their stay. Thus many of the questions related to this indicator are used to assess the degree of visitor satisfaction.

Key questions:
- *What made you select this tourist establishment?*
- *Would you like to visit this tourist establishment again?*
- *Would you recommend this place to your relatives or friends?*
- *What is your overall impression from your stay here?*

The results of this research show that the Kalofer region has a very good image.

Table 2. Visitors to Kalofer

Indicator	Questions from the questionnaires	Value of the index /Increase in %/ Base for comparison		Recommended indicator value
Visitors			Base for comparison	Improvement – As per local strategy
1. Income, demographic characteristics and other data for tourism market	*II Your national identity?* Bulgarian Foreigners	91.5% 8,5		
	II- Your gender? Men Women	51,5% 48,5%	Base for comparison	**Improvement** –product compliance
	II- Your age group? Up to 35 years Up to 45 years	76,9% 23,1	Base for comparison	
	II Your permanent residence? Sofia Other settlements	39,4% 60,6%	Base for comparison	
	II Your family status Not married Married	38,9% 61,1%	Base for comparison	

	-II Your education Semi higher and Higher Secondary	 60,6% 29,4%	Base for comparison	
	II Your profession Administrative work Medium executive level Low executive level Others	 16,5% 45,2% 8,8% 23,6%	Base for comparison	**Improvement** –product compliance
	II-Your material circumstances? -Well-to-do /over the average for the country/ -Average level for the country -Poor (below the average one for the country)	 14,2% 82,9%	Base for comparison	
2. Needs, preferences and interests	***II – Purpose of the visit to the settlement and the surroundings /target activity*** Recreation in natural environment Interpretative tour to local craft Visit to natural landmarks Taking pictures of natural landmarks Tourist trails Interpretative trips in local culture Celebrations and anniversaries	 77,7% 50% 68,4% 50% 61.6% 92.6% 25%	Base for comparison	**Improvement** – according to regional strategy
3. Satisfaction with services and equipment	***II- On the whole, are you satisfied with your vacation?*** Very satisfied Satisfied Unsatisfied	 65% 16% 19%	Index – 0.8 /positive to all responses	**Improvement – value near to 1**
	II –Would you like to visit this tourist destination again? Yes, with pleasure I can't say	 96.9% 3,1%	Index – 0.9 /positive to all answers/	**Sustain**

II – Would you recommend this tourist destination to your relatives or friends?		Index – 0.8 /positive to all responses/	**Sustain**
Yes, absolutely	93.9%		
I can't say	6.1%		
II- Please, assess separate components of tourist supply			
1. Accommodation			
Safety		Index – 1.0 /positive to all responses/	**Sustain**
Very good	60%		
Good	40%		
Conveniences in the rooms		Index – *0.2* /positive to all responses/	**Improvement – value near to 1**
Very good	15%		
Unsatisfactory	85%		
Affability of the personnel		Index – *1.0* /positive to all responses/	**Sustain**
Very good	60%		
Good	40%		
2. Tourist product			
Recreation		Index – *0.5* /positive to all responses/	**Improvement – value near to 1**
Good	50%		
Unsatisfactory	50%		
3. National kitchen		Index – *0.5* /positive to all responses	**Improvement – value near to 1**
Good	50%		
Poor	50%		
4. Amusements		Index – *0.2* /positive to all responses	**Improvement – value near to 1**
Good	2%		

	Unsatisfactory	80%	
	4. Tourist and other relevant information		*Index – 0.6 /positive to all responses/*
	Good	26%	
	Poor	17%	
4.**Behavioral pattern**	*II- How many times have you visited this tourist destination?*		Base for comparison
	First time	63%	
	Second time	20%	
	More than twice	17%	
	II-Where did you get information about this tourist destination?		Base for comparison
	I have been already here	49%	
	From friends and acquaintances	31%	
	II- How has your vacation been organized?		Base for comparison
	Booked by acquaintances	25%	
	Direct booking	13%	
	Chosen at spot	10%	
	Through tourist agency	9%	
	II- How long are you staying here?		Base for comparison
	1 overnight	33%	
	2 overnights	3%	
	II- What are your approximate expenditures for your stay here?		*Base for comparison*
	Up to 50 BGL	53%	
	Up to 100 BGL	20%	

Right-hand column values:

Improvement – value near to 1 (row 4. Tourist and other relevant information)

Improvement –as per local strategy (Behavioral pattern rows)

Improvement –as per local strategy (expenditures row)

	Up to 200 BGL	13%	
	Above 200 BGL	7%	
	II- What recreation activities have you indulged in during your stay here? (in percent)		*Base for comparison*	**Improvement** – as per local strategy
	Recreation in natural surrounding	77,7		
	Visits to natural landmarks	68,4		
	Taking pictures of natural landscapes	50		
	Interpretative tours to local craft	50		
	Interpretation of local culture	92,6		
	Mountain trails	61,6		
	Participation in celebration and anniversaries	25		
	II- What transport did you use to get here?		*Base for comparison*	**Improvement** – as per local strategy
	Personal transport vehicle	25%		
	Public transport	14%		
	Charter bus /organized by a tourist agency/	11%		
	II- Please, assess transport and informational accessibility			
5. Access to services	*Transport accessibility*		Index – *0.9 /positive to all the rest/*	**Improvement**
	Very good	44%		
	Good	48%		
	Informational accessibility		Index – *0. 7 /positive to all the rest/*	**Improvement** - value close to 1
	Very good	38%		
	Good	31%		
	Poor	31%		

6. Parking	*I- Establishments with parking places (number).*		Index – *0.9 /with parking places to all the rest/;Base for comparison*	**Sustain**
	Without parking places	1		
	With parking places	9		
	II- Assess available parking to the accommodation establishment and visit establishments		Index 0.9– /positive to all the rest/	**Sustain**
	Very good	44,4%		
	Good	50%		
	Poor	5,6%		
7. Image of the destination	*II – What made you choose this place?*		Base for comparison	**Improvement** – as per local strategy
	Interest to natural and cultural heritage	54%		
	Beautiful nature	36%		
	Affability of local people	46%		
	I have already been here	11%		
	Safety	9%		
	II- Where did you get information on this place?		Base for comparison	**Improvement** – as per local strategy
	I have already been here	49%		
	From friend and acquaintances	31%		
	II- On the whole, are you satisfied with your vacation?		Index – 0.8 /positive to the rest/	**Sustain** – value close to 1
	Very satisfied	65%		
	Satisfied	16%		
	Unsatisfied	19%		
	II –Would you like to visit this place again?		Index 0.9 /positive to all the rest/	**Sustain**

	Yes, with pleasure	97%	
	I can't say	3,1%	
	II –Would you recommend this tourist place to your relatives or friends?		Index 0.9 /positive to all the rest/	**Sustain**
	Yes, absolutely	94%	
	I can't say	6.1%	

Key to Indicator Values: Improvement; Decrease; Sustain; Increase; *Dots –*absence of statistical data

    I   Questionnaire for managers of tourist establishments
    II   Questionnaire for visitors
    III   Questionnaire for local community
    IV   Questionnaire for local authorities

2.3 Tourist destination

The main groups of indicators for monitoring the tourist destination (Table 3) are:

       1) Number of visitors per sq. km.

       2) Number of visitors as compared to local population

       3) Tourist expenditures

       4) Accommodation costs

2.3.1. Number of visitors per square unit (sq. km or sq. decares) **–** this is a precautionary indicator used to show compliance with the level of loading of recreation areas.

Key questions:

-   *Number of local population*
-   *What is the declared percentage of land for recreation and tourism*
-   *Number of tourists*

There is no statistical data available on the number of visitors but information from tourism entrepreneurs shows an increase in their number. This is a characteristic trend for newly developing destinations.

2.3.2. Ratio of number of tourists to number of local population – this group of indicators helps to identify the degree of psycho-physiological convenience of tourists and of the of local community, as well as favorable conditions for providing services to tourists.

Key questions:

-   *Number of local population*
-   *Number of tourists*

At this stage there is no threat of exceeding the carrying capacity of the destination for the number of tourists.

2.3.3.Tourist expenditure - this indicator shows tourist expenditures in the areas of transportation, accommodation and dining, recreation activities and tourism at the site. The information can be used to develop tourist packages aimed at larger sales of services for recreation, i.e. not solely for accommodation and dining. This indicator should be monitored on regular basis and if possible by month or season.

Key questions:

-   *What is the capacity of the establishment?*
-   *Number of visitors to the community?*
-   *What type of expenses have you made during your stay?*

The main expenses are accommodation and dining costs, and the amount spent on specialized tourist services is rather small in comparison.

2.3.4. Accommodation establishments - this indicator reveals the state of the accommodation sector, which is usually the first one to develop in a given destination. The questions comprise both quantitative and qualitative parameter of establishments monitored*.*

Key questions:

-   *Number of accommodation establishments.*
-   *Type of accommodation establishments, category, operation time*
-   *What is the capacity of the establishment?*
-   *Number of individuals that were accommodated?*

There are nine registered accommodation establishments and half have been in operation for more than four years. The total capacity is 105 beds.

Table 3. Kalofer Tourist Destination

Indicator	Questions from the questionnaires	Value of indicator		Recommended indicator value
Tourist destination		**Measure**	**Index / Base**	
1. Number of visitors per sq. km/decare	*IV- Number of local population*	3782	33 decares per one tourist	**Improvement**- as per regulations
	IV- What is the % of the land for recreation and tourism (decares)	2%	14.6 decares per person for general use (tourist or local resident)	
	IV- Number of tourists	910		
2. Number of tourists to local population	*I- State number of tourists (those with overnights) in the tourist establishments*	833	1 tourist/5 local residents	**Improvement**- as per regulations (to the limit of carrying capacity)
	IV- Number of local population	3782		
	IV- Number of visitors to the community	...	-	Statistics should be carried out

	II- What type of expenditures did you make? (average in BGL)
	   Accommodation
	    Food
	    Sport, amusements and tourist activities
		
		5
		5
		28
			Base for comparison	**Improvement**- as per business plans and local strategy

	I. What is the capacity of the establishments?	…	**-**	Statistics should be carried out
	IV – Number of visitors in the community	…	**-**	Statistics should be carried out
3. Tourist expenditure	*II- What type of expenditures did you make? /average in BGL/* Accommodation Food Sport, amusements and tourist activities	 5 5 28	Base for comparison	**Improvement**- as per regulations (to the limit of carrying capacity)
4. Accommodation facilities	*IV- Number of accommodation establishments*	9	Base for comparison	**Increase**
	I- *What is the type of establishment, when was it established, is it categorized and what is its category? (number, stars)*		Index – 0.6 /ratio of establishments to private lodgings	Increase – higher values of ratio
	A) Family Hotel 1 year	1, no stars		
	B) Country house 1 year	2, 1 star	Index – 0.6 /ratio of categorized establishments to not categorized	Improvement – of category as per business plans

C) Private lodging			
1 year	1, no stars		
3 years	1, no stars		
over 4 years	3, 1 star		
D) Monastery			
1 year	1, no stars		
I- What is the capacity of the establishment?		Base for comparison	Improvement – as per local strategy
Single and double rooms	50		
Rooms with 3 and more beds	55		
I- What is the number of visits (with overnights)?	865	Base for comparison	Increase

Key to Indicator Values: Improvement; Decrease; Sustain; Increase; *Dots* – absence of statistical data

    I   Questionnaire for managers of tourist establishments
    II   Questionnaire for visitors
    III   Questionnaire for local community
    IV   Questionnaire for local authorities

2.4 Economic effects of tourism

The economic effects of tourism demonstrate the role of tourism in the overall economy. These indicators reflect both the dynamics of tourist businesses and the promotion of economic activities related to providing services to tourists. At the initial stage of tourism development, it is advisable to monitor almost all indicators throughout the year to see the changes in its development. At further stages of development, some indicators should be monitored periodically, every 3-5 years, to capture the macroeconomic changes that have taken place such as changes in the number of enterprises and number of beds.

The economic indicators (Table 4) are:
   1) Jobs
   2) Number of tourism enterprises
   3) Local entrepreneurship
   4) Revenues from tourism
   5) Number of certificates issued
   6) External work force as compared to local unemployment
   7) Economic costs of related business development

2.4.1. Jobs – questions from this group of indicators overlap with questions regarding work force in the section devoted to the tourism sector. In this section they are interpreted chiefly by comparing them with the same indicators covering the overall economic sphere of the region. This requires consistent and well structured monitoring to collect statistical data. This research has focused on comparing two indices – employment in % of local population and average salary.

Key questions:
- *How many people are employed in the tourist establishments in the region?*
- *What is the profile of those employed? – owners, family members, hired labor force from local community/other communities, full or part time, men/women.*
- *How many of those employed get a) minimal salary, b) average for the country and c) above average for the country?*
- *How many of those employed consider that tourism is their a) main activity, b) additional activity?*
- *How many of those employed in tourism have the necessary education and qualification?*
- *How many of those employed have former experience in the sphere of tourism?*
- *What are the training/educational needs in the area of tourism?*
- *What is the number or percentage of local people employed in tourism?*
- *What is the size of the average salary in the community?*

Eco-tourism is a main source of income for half of those employed in it. The number of qualified personnel is insignificant. The dynamics of this indicator need to be monitored.

2.4.2. Number of enterprises accompanying and supporting tourism development – this group of indicator illustrate the scope and structure of other economic activities that have developed to provide services for tourists. Statistical observation of this indicator is important for developing and refining economic development plans for the community over the long-term. The public sector/local authorities should monitor these indicators.

Key question:
- *Number of tourism-oriented enterprises*

For the last three years, there has been a considerable increase in the number of enterprises related to tourism development. This speaks to the positive economic impact of tourism on the community's economy.

2.4.3. Local entrepreneurship – this group of indicators shows whether tourism is going to have greater or lesser effect on the local community in terms of profit (does it stay with the community); employment of local people, and favorable business environment (credit opportunities).

Key questions:
- *Type of establishment - own property, rented, other forms*
- *Is the manager of the establishment the owner (local, external) or hired (local, external)?*
- *Have you taken out a bank loan and how many times?*
- *Who makes the decisions for new investments and larger costs for the establishment?*
- *How do you recruit your customers?*
- *Are you a member of some organization related to tourism?*

Local entrepreneurs own all but one of the establishments, and none have financed their costs with a bank loan. Only three establishments are members of tourist organization.

2.4.4. Revenues/income generated from tourism - this group of indicators shows the direct effects of tourism on revenues/income generated in the municipality.

Key questions:
- *What % of community income comes from tourism?*
- *What is the share of tourism in the overall revenues of the municipality?*

There are no relevant statistical data on these issues.

2.4.5. Number of certificates issued - this group of indicators is closely associated with the group of indicators for local entrepreneurship. It shows the growth and structure of tourism, and indirectly the stage of development of the destination.

Key questions:
- *Number of certificates issued*
- *Type of certificates issued*

There has been an increase in the number of certificates, mostly for catering services.

2.4.6. External labor force /local unemployment – this indicator is important for identifying the direct impact of tourism on local employment.

Key questions:
- *What percent of the local population is employed in tourism?*
- *What is the level of unemployment?*
- *Number of people receiving social assistance*
- *Number of people that have moved from the settlement*
- *Number of people that have settled in the community*

Those employed in eco-tourism are about 1 % of the local community, so this sector has had an insignificant effect for job creation.

2.4.7. Economic costs for developing eco-tourist enterprises business in the regions – this group of indicators show the direct effect of eco-tourism on the local economy and it shows efforts by the public sector to create a favorable business environment for tourism development.

Key questions
-   *Where did you get the materials, resources and equipment for your establishment?*
-   *What are your costs for the establishment (% of the total)?*
-   *How are new investments allocated?*
-   *What are the expenditures of the municipality for improving and maintaining the overall infrastructure?*
-   *What are the costs of the municipality directly related to tourism?*

Eco-tourism businesses tend to purchase their goods and services locally, which support the development of other small-scale businesses.

Table 4. Economic Effects of Tourism in Kalofer

Indicators	Questions from the questionnaires	Value of indicator	Value of index/ Growth in %/Base	Recommended indicator value
Economic		Number/ %		
1. Jobs	*I – How many people work in the establishment?*	10	Base for comparison	
	I – What is the profile of those employed? Local people or from other community Permanently or temporarily employed Full time or part time Men or women	10/0 7/3 7/3 5/5	Index – 0.7 / ratio of full to part time employment, of permanent to seasonal employment Index - 1 / ratio of local to external employees / Index – 1 /ratio of man to women	**Sustain or Improvement** – depending on local strategy
	I – How many of those employed receive: The minimal salary The average for the country Above the average for the country	- 10 -	Base for comparison	**Improvement**
	I- For how many of those employed is tourism: Main occupation Additional occupation	52% 24%	Index – 0.5	**Improvement** – as per business plans
	I- How many of those employed have he necessary qualification and training?	-	Index 0.0	**Improvement** – as per business plans

	I- How many of those employed in the establishments worked previously in the area of tourism?	-	Index - 0.0	**Improvement** – as per business plans
	I- In your opinion what are the educational/training needs in your establishment? Room maids Cooks Waiters Receptionists	 75 10 10 10	Base for comparison	**Improvement -** as per business plans
	IV- Number or percent of local people employed in tourism	0.8%	Base for comparison	**Increase** – as per local strategy
2. Number of enterprises involved in tourism	*IV- Number of local enterprises involved in tourism*	5	Base for comparison	**Increase**
3. Local entrepreneurs	*I- Type of establishment (number)* - Owned - Rented	 8 11	Index – 0.9	**Sustain**
	I- The manager of the establishment is: Local owner Local resident employed	 89 % 11 %	Index – 0.9	**Sustain**
	I- Does the establishment got a business plan?	0	Base for comparison	**Improvement**
	I- Have you used a bank of other type of loan? What loan, how many times and time terms?	-		
	I- Who makes the decisions on new investments and larger costs of the establishment? The owner of the establishment	 100%	Index – 0.0/ ratio of employed to managers	**Improvement**

	I- How do you attract your customers? -Through tourist mediators - Friends and acquaintances - Tourist Advertising - Other sources	 10 % 55 % 30 % 5 %	Index– 0.4 /ratio of marketing channels to other ways	**Improvement** – as per business plans
	I- Are you a member in some organization related to tourism? Establishments that are not members to any relevant organization Establishments that are members of such organizations	 67 % 33 %	Index – 0.3 /members to non-members	**Increase –** higher values
4. Revenues from tourism – municipal and central state	*IV- What percent of locally generated revenues come from tourism?*	**...**	-	Statistics should be provided
	IV- Share of tourism in the economic structure of the community (% of total revenues of the municipality)	**...**	-	Statistics should be provided
5. Number of certificates issued	*IV- Number and types of certificates for tourist operation issued by the municipality*	17	Base for comparison	Statistics should be provided
6. External work force/local unemployment	*I- The manager of the establishment is:* a local person local resident employed	 89 % 11 %	Index – 0.9	**Decrease –** it is recommended ratios, percentage and number of local residents employed in tourism to be bigger than that one of external labor force
	IV- How many of those employed in the establishment are local residents?	100%		
	IV- What is the % of local people employed in tourism?	0.8 %	Index 0.3 / employed in enterprises as per all those employed	
	IV – What is the level of unemployment /% of active population/?	5 %	Base for comparison	
	IV- Number of people receiving social assistance	350	Base for comparison	
	IV- Number of people that have moved from the settlement	100	Base for comparison	
	IV- Number of people that have settled in	20	Base for comparison	

7. Economic costs for business development	*I- Where do you purchase materials, resources and equipment for your establishment?*
	    From the settlement or the municipality region
	    From outside sources
		
		95 %
		5 %		

	I- What are your expenditures (in %)?
	    Local taxes and charges
	    New equipment
	    Rehabilitation works
	    Resources and materials
	    Advertising
		
		55
		33
		22
		20
		15
			Base for comparison	**Improvement** – as per business plans

	I- Has the establishment got a business plan?	0	Base for comparison	Sharp **improvement**
	I- Have you used a bank or some other type of loan? What type of loan, how many times and at what time terms?	-	Base for comparison	**Improvement** – as per business plans

	I- How are new investments allocated? (%)
	    New furnishing
	    New equipment
	    Rehabilitation
	    Marketing and advertising
	    New jobs
		
		15
		30
		15
		6
		3
			Base for comparison	**Improvement** – as per business plan

	IV- What are the expenditures of the municipality for improving and maintaining the overall infrastructure?	42%	50% Growth as compared to 1999	**Improvement**
	IV- What are the expenditures of the municipality for tourism?	8300 BGL	60% Growth as compared to 1999	**Improvement**

Key to Indicator Values: Improvement; Decrease; Sustain; Increase; *Dots –*absence of statistical data

I   Questionnaire for managers of tourist establishments
II   Questionnaire for visitors
III   Questionnaire for local community
IV   Questionnaire for local authorit

2.5. Social effects of tourism

The indicators used for monitoring social effects have been chosen to evaluate the positive impacts of tourism on the social life of the local community and the indirect effects.

The main groups of indicators (Table 5) are:
1) Number of facilities for local use in relation to population and number of visitors
2) Loading of facilities providing services for local population
3) Noise pollution and pollution from solid wastes
4) Traffic
5) Irritability index
6) Development of the municipality (population, country houses, new houses)
7) Change in ownership of the land
8) Change in family structure

2.5.1. Number of facilities for local use in relation to population and number of visitors - this group of indicators shows whether tourism development leads to improvements in the overall and specialized recreational infrastructure, or brings discomfort to both the local population and tourists.

Key questions are:
- *Number of commercial and social infrastructure enterprises providing services to the local population*
- *Number of enterprises in the area of sport, recreation and amusements meant to be used by both local community and tourists*

There was a 48% growth in commercial and social infrastructure enterprises in 2001, as compared with 1999. There are no available statistics for recreation and sports enterprises.

2.5.2. Loading of facilities providing services for local population - this indicator is closely connected with the previous one. In general, in destinations where development of small-scale eco-tourism is anticipated the level of loading should not exceed even its medium values.

The degree of loading on enterprises providing services is low.

2.5.3. Noise pollution and pollution from solid wastes - this indicator is viewed in ecological terms. Its values should be within the minimal limits for communities with types of tourist development other than the traditional large-scale tourism.

There are two **key questions**:
- *Level of noise pollution coming from vehicles or production processes*
- *Quality of solid wastes, in thousand cubic meters or tons*

There is a low level of noise pollution, but solid waste volumes are increasing.

2.5.4. Traffic – this indicator is monitored by following the intensity of traffic in- and off-season.

The key **question is:**
What is the level of traffic intensity along the roads (high, medium, low)

There is a high level of traffic intensity throughout the year in the Kalofer region.

2.5.5. Irritability index This is a complex indicator reflecting the impact of a number of factors related to tourism development in a given community. Usually the expansion of tourism brings about negative attitudes or negative behavior on the part of the local community. This indicator implies projections of all social indicators mentioned so far. It is very important to monitor current opinions, views and attitude of local communities towards tourists since successful tourism development is impossible without their support.

Key issues related to this group are:
- *Tourism creates problems in providing services for local population (% of those responding)*
- *Tourism deteriorates places where it develops.*
- *Tourism improves quality of life in the settlement*

No irritability has been measured in the local community.

2.5.6. Community development (population, country houses, new houses) – Practice show that tourism development overall is based on developing communities. If there is no development of the community or its infrastructure, both general and specialized, then tourism development would be rather limited. This is especially valid for eco-tourist destinations, since tourist consumption itself is closely related with a stay at, and contact with local people and the use of common facilities.

Key questions –.
- *Number of local population*
- *Number of second lodgings*
- *New houses constructed*
- *Do you have a country house/cottage in the surroundings?*
- *How do you personally perceive yourself - poor, of average income or well to do?*

On the whole, there is a positive trend in local community development. New houses and country houses are being constructed, and most local people declare that they have an average living standard. The level of emigration is negligible.

2.5.7. Change in the ownership of the land **–** the research shows that 15% of the land in this region is owned by the local population. Since there is no statistical data available for previous years, this percent can be used for comparative purposes in the future.

2.5.8. Change in family structure **-** this indicator is important for analyzing conditions for eco-tourism development, since this is a form of tourism founded essentially by family businesses. The indicator also shows the capacity of the available work force.

Key questions:
- *How many are there in your family?*
- *Average number of people in one household?*
- *Have you any kids below 15 year of age?*

The results are similar to the average for the country

Table 5 Social Effects of Eco-tourism in Kalofer

Indicators	Questions from the questionnaire	Value of the indicator	Value of the index /Growth in %/ Base for comparison	Recommended indicator value
Social				
1. Number of facilities for local use in relation to number of local population and number of visitors	*IV- Number of enterprises providing services for local population (commercial and public)*	39	Growth 48 %	**Improvement-** as per regional plan
	IV- Number of enterprises in the area of sport, recreation and amusement used both by local community and tourists	21		
2. Loading of facilities serving local population	*IV- Level of loading of enterprises providing services (high, medium, low)*	Low	Base for comparison	**Decrease**
3. Noise and solid wastes pollution	*III - Tourism leads to problems in providing services for local community* Yes No I can't say	 4 % 71 % 25 %	Index – 2.3 / positive to negative responses	**Increase –** value bigger than 1
	IV- Quantity of solid wastes in the municipality (tons)	2300	Base for comparison	**Decrease**
	IV- Level of noise pollution (high, medium, low)	Low	Base for comparison	**Decrease**
4. Traffic flow	*IV- Intensity of traffic along the roads (high, medium, low)*	High	Decrease	Decrease
5. Irritability index	*III- Tourism causes problems in providing services to local population* Yes No I can't say	 4 % 71 % 25 %	Index– 2.3 /positive to negative answers/	**Increase –**value higher than 1

	III- Tourism deteriorates the places where it develops Yes No I can't say	3.7 % 79,3 % 17 %	Index – 3.8 /positive to negative answers /	**Increase** –value higher than 1
	III-Tourism improves the quality of life in the settlement? Yes No I can't say	82 % 7 % 11 %	Index – 4.5 /positive t negative answers/	**Increase** –value higher than 1
6. Development of destination (population, country houses, new houses)	***IV- Number of local population***	3782	Base for comparison	As per regional plan
	IV- Number of second homes	160	Base for comparison	
	IV- New houses constructed	3	Base for comparison	
	III-When was the house you live in built? (number) 1990 – 1998 1980 – 1989 1960 – 1979 1950 – 1959	6 5 19 13	Base for comparison	As per regional plan
	III- Number of country houses/cottages in the surroundings? Belonging to local population Belonging to other people	160 60	Base for comparison	As per regional plan
	III- How do you perceive yourself - poor, of average income or well to do? Poor With average income I cannot say	19% 62% 19%	Base for comparison	**Improvement** – as per local strategy
7. Change in ownership of land	***IV- % of land ownership of local residents***	14.84 %	Base for comparison	As per regional plan

8. Change in family structure	***III- How many members are there in your family?***		Base for comparison	As per regional plan
	4 persons	31 %		
	3 persons	19 %		
	2 persons	26 %		
	Other	14 %		
	III- Have you any kids below 15 year of age?		Base for comparison	As per regional plan
	Yes	18 %		
	No	82 %		
	IV- Average number of people in one household	2,7	Base for comparison	As per regional plan

Key to Indicator Values: Improvement; Decrease; Sustain; Increase; ***Dots –***absence of statistical data

I   Questionnaire for managers of tourist establishments

    II   Questionnaire for visitors

    III   Questionnaire for local community

    IV   Questionnaire for local authorities

2.6 Cultural effects of tourism

Cultural effects appear to be among the most important to tourism related to the cultural heritage of the community. Similar to other effects, they are viewed as positive or negative and may appear simultaneously**.**

The main groups of indicators (Table 6) are:
>   1). Ratio of tourists (domestic, regional, international) to local population
>   2) Number of cultural festivals
>   3) Change in local values, dress and customs
>   4) Compliance of infrastructure design with local culture
>   5) Degree of use of local knowledge and skills in tourism

2.6.1. Ratio of tourists (domestic, regional, international) to local population - this group of indicators shows the possible effects of tourists upon the local community depending on their nationality and related models of behavior, as well as features of life style and culture that could be used for developing tourism.

Key questions:
- *Number of tourists in the community*
- *Number of local population*
- *Permanent residence of tourists (country, town)*
- *Number of visitors in your establishment*

This ratio cannot be established due to absence of statistical data and monitoring.

***2.6.2. Numbers of cultural festivals* -** this index is indicative of the degree of inclusion of local cultural traditions and customs in tourist supply.

Key question
- *Number of festivals and public events (parades, festivities, and other celebrations)*

Nine cultural events took place last year. There is no statistics for previous years.

2.6.3. Change in local values, dress and customs – the indicator shows whether tourists change local culture in positive or negative ways.

Key question:
- *Do you think that tourism tends to bring changes in local values, dress and customs?*

At this time there is no threat of changes.

2.6.4. Compliance of infrastructure design with local culture - this indicator shows the degree to which tourism development complies with the characteristic features of cultural heritage, which is an essential product in this destination.

Key questions:
- *Degree of compliance of architectural design of tourist infrastructure and existing facilities with local culture (high, medium, low)*
- *Do you think tourism preserves/meets local architectural environment?*

There is a medium level of consistency of tourist infrastructure with local infrastructure.

2.6.5. Degree of use of local knowledge and skills in tourism – this indicator reveals the degree to which cultural heritage is included and what aspects of this heritage are made available.

Key questions:
- *Are local life style and culture, skills and knowledge included in offering services and goods for tourists?*
- *What other services does the establishment offer?*
- *Which of them are related to local folklore, culture, traditions and customs?*

A range of crafts is included in local eco-tourism supply in the Kalofer region.

Table 6. Cultural Effects in Kalofer

Indicators	Questions from questionnaires	Index value		Recommended indicator value
Cultural		**Measuring unit**	**Index/ Base for Comparison**	
1. Ratio of tourists /domestic, regional, international/ to local population	*IV- Number of tourists*	**....**		**Improvement** - as per local strategy
	IV- Number of local population	3782	Base for Comparison	
	II- What is your permanent residence (country)? Bulgaria Other countries	91,5 % 8,5 %	Base for Comparison	
	II- Where do you live (settlement)? Sofia Plovdiv Kozlodui Other settlements	39,4 % 21,2 % 11,4 % 28 %	Base for Comparison	
	I- Number of visitors / with overnights/ in your establishment: Bulgarians Foreign citizens	833 77	Base for Comparison	
2. Dynamics in the number of cultural festivals	*IV- Number of cultural festivals and events (parades, festivities, manifestations, etc.)*	9	Base for Comparison	**Improvement** - as per local strategy
3. Change in local values, dress and customs	*III- Do you think that tourism tends to change local values, dress and customs?* Yes No I can't say	13,3% 67,2% 19,5%	Average value	**Decrease -** average index value should approach 1

		low	Base for Comparison	**Improvement** – as per regulations
4. Compliance of infrastructure design with local culture	*IV- Level of compliance of the architectural design of tourist infrastructure and existing facilities with local culture (high, medium, low)*			
	III- Do you think that tourism preserves and corresponds to local architectural environment and life style of community? Yes No I can't say	 76% 11% 13%	Index – 0.7 / positive as per the rest of responses/	**Increase** – average index value should approach 1
5. Degree of utilization of local knowledge and skills in tourism	*III- What services and goods of local life style and culture, skills and knowledge are offered to tourists?*		Index – Ratio of guests' responses to those of the establishments	**Improvement** – index value higher than 1 **Improvement**- as per local strategy And business Plans
	Wood-carving	62%	Index – 0.7	
	Folklore interior	52%	Index – 2.4	
	Carpentry	50%	Index – 0.6	
	Culinary art	48%	Index – 0.5	
	Weaving	40%	Index – 1.6	
	I- What extra services does the establishment offer? Which of them are related to local folklore, culture, traditions and customs? Woodcarving Culinary art Carpentry Weaving Folklore interior	 83% 75% 75% 50% 21%		**Increase** - as per local strategy And business Plans

Key to Indicator Values: Improvement; Decrease; Sustain; Increase; ***Dots* –**absence of statistical data

I   Questionnaire for managers of tourist establishments
II   Questionnaire for visitors
III   Questionnaire for local community
IV   Questionnaire for local authorities

3.0 Conclusions and Recommendations

This research project achieved its main goals of applying the *Guide for Monitoring Eco-tourism Impacts* to the Kalofer pilot region, and collecting data for a database that can be used for comparing future changes in eco-tourism development in the region.

3.1 Methodological conclusions

The main methodological conclusion is the need to reduce the number of indicators and the number of indices in particular. This reduction should be made on the basis of the specific status and business objectives of each establishment.   The evaluation categories in the questionnaires should be decreased and the same number of evaluation scales should be used in all of the questionnaires. This will facilitate the statistical analysis of the data collected. Specific and more detailed questions could be used when trying to identify problems and areas of special concern.

3.2. Conclusions related to indicators

I. Tourism sector

Eight groups of indicators were used in this research:
1) Number of those employed in tourism
2) Type of employment
3) Salaries/wages
4) NGO-s involved in tourism
5) Contribution on the part of government (constructions, donations, etc.)
6) Improvements that are needed – facilities and services
7) Availability of local training in tourism
8) Allocation of responsibilities among the private sector, the state and the public sector, including NGO-s

All eight groups should be monitored on an annual basis. Measuring these indicators shows the state of various components and elements of the tourism sector and allows for a comparison with normative or standardized and target values. Indicators 4,6,7 and 8 should be supported with data from local authorities and NGOs, while the rest should be monitored at each establishment as appropriate.

II. Visitors
Monitoring visitors is a very important aspect of an overall monitoring program and these indicators should be assessed consistently.

The main groups of indicators are
1) Income, demographic characteristics and other data for tourism market
2) Needs, preferences and interests
3) Models of visits
4) Satisfaction with services and facilities
5) Access to services
6) Parking places.
7) Image of destination

Indicator groups 5 and 6 should be observed every three or four years, since changes tend to occur every few years. These groups of indicators should be monitored by local authorities, which should also provide statistical information for the analysis. In addition number 6 should be monitored at tourist establishments, since it is here that relevant measures for improving this indicator can be taken. Indicator 1 requires registration of new customers every time they come. If customers who come a second or more times are to be considered, monitoring of this indicator may be conducted every 2 or 3 years. Indicator 4 is subject to constant monitoring, regardless of whether customers are old or new. It is advisable that all questions from Table 2 be utilized and included in a separate questionnaire form to be filled in at the end of the stay.

As noted, monitoring of visitors is an element of great significance to the system of monitoring that is why they have to be observed non-stop.

III. Tourist destination

The groups of indicators are:
        1) Number of visitors per sq. km.
        2) Number of visitors to local population
        3) Tourist expenditure
        4) Accommodation costs

Indicator groups 1, 2 and 4 should be monitored by local authorities on an annual basis with a view of recording damages to tourist resources, such as loading and degradation, as well as to obtain a full picture of visits both to the region and to the entrepreneurs' sector. Indicator group 3 illustrates the effectiveness of functioning tourist attractions. It should be monitored at/by the establishments, constantly and in every season.

IV. Economic effects

There are seven groups of economic indicators:
        1) Jobs
        2) Number of enterprises that are tourism-oriented
        3) Local entrepreneurship
        4) Income/revenues from tourism
        5) Number of certificates issued
        6) External labor force as compared to local unemployment
        7) Economic costs of tourism

Local authorities should observe all the indicator groups on an annual basis. The Eco-tourism Association Central Balkan-Kalofer should be asked to cooperate and actively participate in the monitoring process. These indicators focus on the particular eco-tourism locations and its influence on the overall economy of the municipality

V. Social effects

There are eight indicator groups:
        1) Number of facilities meant for local use in relation to population and number of visitors
        2) Loading of facilities providing services for the local population
        3) Noise and solid waste pollution
        4) Traffic flow
        5) Index of irritability

6) Development of the municipality (population, country houses, new houses)
7) Change in land ownership
8) Change in family structure

Local authorities should observe these indicator groups annually. Certain statistics for a number of indicators are lacking. The non-governmental sector should initiate monitoring of these indicators to begin to establish a database. These indicators primarily measure loading on different environmental components, and serve as a basis for managing actions and measuring their results. The tourism sector should become acquainted with them and adjust the size of tourist groups in such a way so as to avoid degradation of natural complexes.

VI. Cultural effects

The main groups of indicators used in this research for identifying these effects are:
1) Ratio between tourists (domestic, regional, international) and local population
2) Number of cultural festivals
3) Change in local values, dress, and customs
4) Compliance of infrastructure design with local culture
5) Degree of utilization of local knowledge and skills in tourism

Local authorities should collect data annually on indicator groups 1 through 4, since they cover the overall impact of tourism on culture and cultural heritage of the community. The current lack of statistics doesn't allow for the clear identification of impacts from tourism. Indicator group 5 should be seasonally monitored by tourist establishments themselves and the results used to compare with tourist expectations for supply of goods and services related to local cultural heritage.